

Welcome to the all-in-one platform for your pre-tax benefits!



Getting started

Forma is home to your **pre-tax benefit accounts**.

Check your balance, browse eligible items, and track your transaction history, all in one place. Simply log in to Forma to get started.

Frequently used tools

Home

On the top navigation bar, click **Home** to see a snapshot of your benefits, quick links, tasks, and a list of frequently asked questions.

Benefits

On the top navigation bar, click **Benefits** to get a view of all your active benefits including available balance, account coverage dates, and last day to submit claims.

Store

Forma links you directly to **Pre-tax FSA and HSA Stores** so you can find pre-tax items guaranteed to be eligible.

Profile

Click on the **Profile** icon to bring up information about your Forma Card, linked accounts, notification preferences, and dependents.

Support

On the lower right corner, our **Forma Support team** is one click away to help with anything you need.

Ways to spend

Pre-tax FSA and HSA Stores

Log into your Forma account to browse a vast list of products and services all guaranteed to be pre-tax eligible.

- + No reimbursement claims required

Reimbursement claims

File a reimbursement claim for any out-of-pocket eligible expenses. Make sure to keep the receipt for verification!

- + A simple claims form is available in-app and on mobile
- + Get approved in 2–3 days
- + Approved funds are paid out via direct deposit

Forma Pre-tax Card

Forma Pre-tax Card offers a convenient way to spend on purchases.

- + Transactions automatically verified at POS
- + Available for use on eligible expenses anywhere Visa card is accepted
- + No reimbursement claims required

